



DRAWINGS
FOR
APPLICATION
FOR
UNITED STATES LETTERS PATENT

TITLE: COLLECTING AND ANALYZING SURVEY DATA

APPLICANTS: LANCE PARKER, FERNANDO ALVAREZ and MICHAEL H. COEN

FIGURES: 1 through 17

SHEETS: 17

CERTIFICATE OF MAILING BY EXPRESS MAIL

Express Mail Label No. EL227256583US

I hereby certify under 37 CFR §1.10 that this correspondence is being deposited with the United States Postal Service as Express Mail Post Office to Addressee with sufficient postage on the date indicated below and is addressed to the Commissioner for Patents, Washington, D.C. 20231.

December 22, 2000

Date of Deposit

Signature

Typed or Printed Name of Person Signing Certificate

Victor Mahoney
Victor Mahoney

FIG. 1 is a block diagram of a network system 10. The network system 10 includes a server 12, a network 14, and two clients 16. The server 12 is connected to the network 14, and the network 14 is connected to the clients 16. The server 12 includes a processor 22, a storage medium 24, an operating system 26, an engine 28, a library 30, and a protocol stack 32.

10

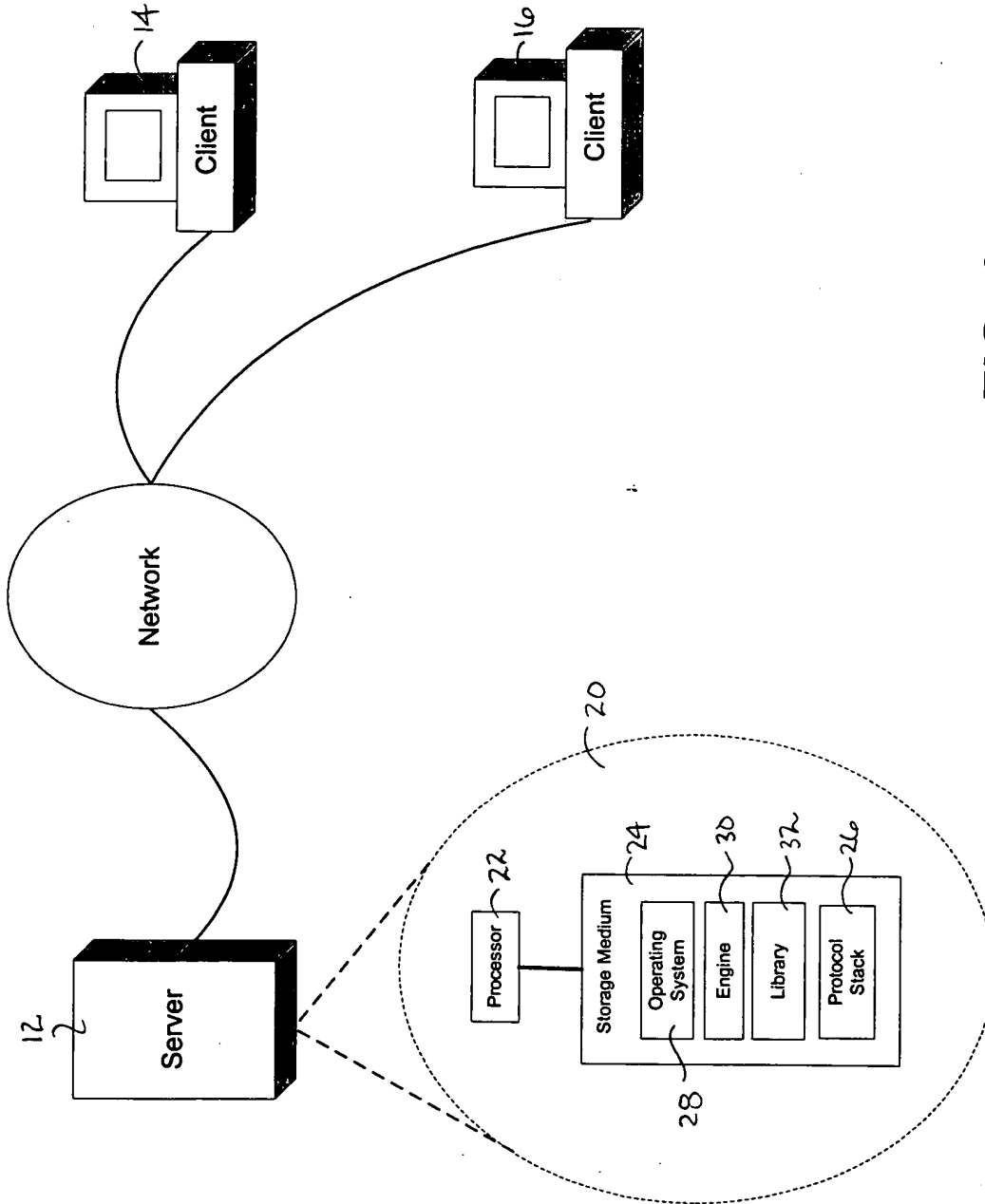


FIG. 1

18

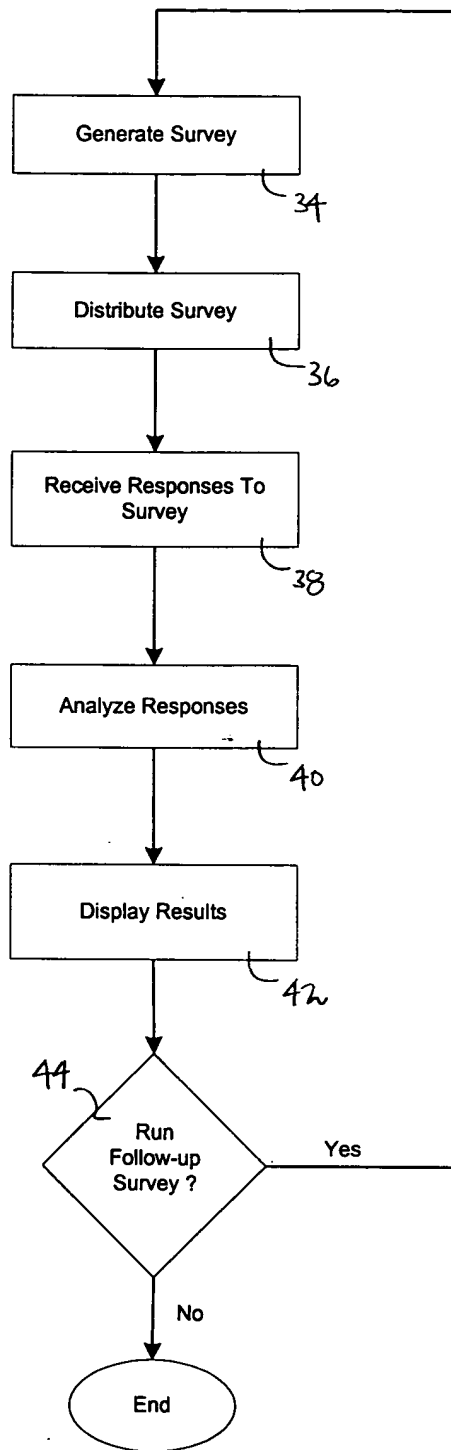


FIG. 2

A. General Purpose Survey

How are we doing overall?

B. General Area Surveys

How are we specifically doing in any of:

- 1) Customer Satisfaction ~ 50
- 2) Channel Relationships ~ 52
- 3) Competitive Position ~ 54
- 4) Image ~ 56
- 5) Awareness ~ 58

C. Focus Surveys

Reseller Satisfaction Surveys:

Customer:

Sur

- 1) How does reseller satisfaction vary across:

- products? ~ 66
- product/service attributes? ~ 68
- customer segments? ~ 70

- 2) How can we use reseller satisfaction to improve profitability? Are there:

- competitive performance gaps?
- expectations gaps?

- 3) For similar products/services, how satisfied

Channel Relationship Surveys

Awareness Surveys

FIG. 3

72

ACME

Actions ~ 74

Manage Surveys

Select & Run ~ 80

Survey ~ 82

Manage Existing Surveys

Perform Analysis

View ~ 84

Report Card

View ~ 86

Leverage Points

View Data

Create ~ 88

Charts & Graphs

View Customer Segments ~ 90

Examine, modify, or re-use surveys you've previously created.

Recent Surveys ~ 76

Name ~ 92

1) General Survey
How are we doing overall?

2) Reseller Satisfaction
How does it vary across product lines?

3) Situation Assessment
Where does performance most need improvement?

Date

10/1/00

9/7/00

9/1/00

Status

75%

85%

94%

more...

Indicators ~ 78

98 Reseller Satisfaction by Product
9/1/00 - 10/1/00

Product 1 8.5 ↑ +5%

Product 2 6.5 ↓ -7%

Product 3 5.4 — +3%

Overall 7.5 ↑ +4%

100 Satisfaction w/After-Sale Service
9/1/00

ACME 3.5

Nortel 7.5

Lucent 5.4

more...

FIG. 4

Survey Selector

Recommend Next Survey

	Name	Last Run	Status
A.	General Purpose	10/1/00	75%
B.	General Area Surveys:		
	Channel Relationships:		
	Customer Satisfactio		85%
	Competitive Positior		94%
	Awareness		—
	Image		—

106

Hint:

Click on any survey name to access it. If you'd like BizSensor to recommend the next survey, click on Recommend Next Survey above.

- ☒ Turn off this hint in the future.
☒ Turn off all hints in the future.

Never

C. Go to Focus Survey Library

FIG. 5

Survey Selector

Recommend Next Survey

	Name	Last Run	Status
A.	General Purpose	10/1/00	75%
B.	General Area Surveys:		
	Channel Relationships	9/7/00	85%
	Customer Satisfaction	Never	Scheduled 10/12/00
	Competitive Position	9/1/00	94%
	Awareness	Never	-
	Image	Never	-
C.	Go to Focus Survey Library		

FIG. 6

114
115
116
117
118
119
120
121
122
123
124
125
126
127
128
129
130
131
132
133
134
135
136
137
138
139
140
141
142
143
144
145
146
147
148
149
150
151
152
153
154
155
156
157
158
159
160
161
162
163
164
165
166
167
168
169
170
171
172
173
174
175
176
177
178
179
180
181
182
183
184
185
186
187
188
189
190
191
192
193
194
195
196
197
198
199
200

Surveys

	Question To Answer	Last Run
Channel Relationships	1) Overall, how satisfied are resellers?	116 9/1/00
Customer Satisfaction	2) How does reseller satisfaction vary across: - products? - product/service attributes? - customer segments?	Never
Competitive Position	3) For similar products/services, how satisfied are resellers with our products versus those of competitors?	Never
Awareness	4) How can we use reseller satisfaction to improve profitability? Are there: - expectations gaps? - competitive performance gaps? - areas of over and underperformance?	Never
Image		

FIG. 7

General Purpose Survey

Actions

View Results Preview Survey Edit Survey

Running the Survey

Run this survey: Now

Schedule

Recent General Surveys

Date	Status	# Respondents
1) 10/1/00	75%	190
2) 9/1/00	Complete	275
3) 8/15/00	Complete	300

Deployment Options:

Channels

Locations

Audience

Automatically run this survey: ☒

Every 1 Months

FIG. 8

General Purpose Survey

Actions

[View Results](#) [Preview Survey](#) [Edit Survey](#)

Running the Survey

Run this survey:

[Now](#)

[Schedule](#)

Recent General Surveys

Date	Status	# Respondents
1) 11/1/00	Scheduled	
2) 10/1/00	75%	190
3) 9/1/00	Complete	275

Click here for details about the 9/1 survey, including access to descriptive statistics.

Deployment Options:

[Channels](#)

[Locations](#)

[Audience](#)

Automatically run this survey:

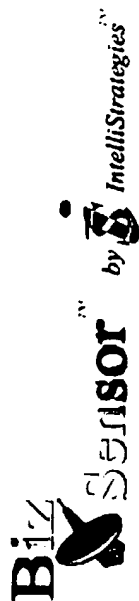
Every:

1

Months

FIG. 9

160



Survey Editor: Customer Satisfaction

Account Info

Customer Support

Online Tutorial

Help

ACME

← Previous Screen

1) Do you currently own or use a laptop computer?

- ☒ Yes, I own a laptop computer
☒ Yes, I use a laptop computer that I don't own
☒ No, I neither own nor use a laptop computer
☒ No, I used to use a laptop computer but no longer do

2) How long have you owned or used any brand of laptop computer?

- ☒ Less than 1 year
☒ 1-3 years
☒ More than 3 years
☒ Never owned or used

3) Please select all the brands of laptop computer you have ever owned or used. (Choose all that apply.)

- ☒ Dell
☒ IBM
☒ Compaq

Modify Selected Question

162 — Edit

164 — Delete

166 — Insert



Actions

172 — Save

174 — Undo

176 — Redo

178 — Reset

180 — Done

FIG. 10

ACME

236

Account Info Customer Support Online Tutorial Help

238

Report Card for ACME Widget

Period: 9/1/00 - 10/1/00

Page 1 | Page 2 | Main

268 — Recommend Next Survey

Customer Satisfaction 184

Product 186	75%	↑	+4%
Loyalty 188	50%	—	+1.2%
Services 190	35%	—	-0.2%

Strategic Position - Ranking 202

As of: 10/1/00	Previously: 9/1/00
1) Company 1	1) Company 1
2) Company 2	2) Company 2
3) ACME	3) ACME
4) Company 3	4) Company 4
5) Company 4	5) Company 3

Most Satisfied Resellers

Reseller 1	8.5	↑	+1.2%
Reseller 2	8.3	↑	+4.0%
Reseller 3	8.1	↓	+1.2%
Reseller 4	7.5	↓	-3.0%

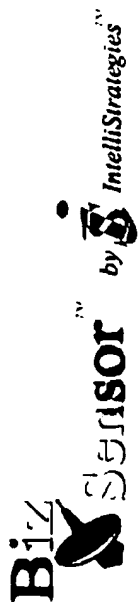
Least Satisfied Resellers

Reseller 5	3.5	↓	-2.0%
Reseller 6	3.9	—	+1.2%
Reseller 7	4.2	↑	+3.0%
Reseller 8	4.5	↓	-0.2%

FIG. 11

232
✓

if it is not possible to find a way to do it, then it is not possible to do it.



ACME

Account Info Customer Support Online Tutorial Help

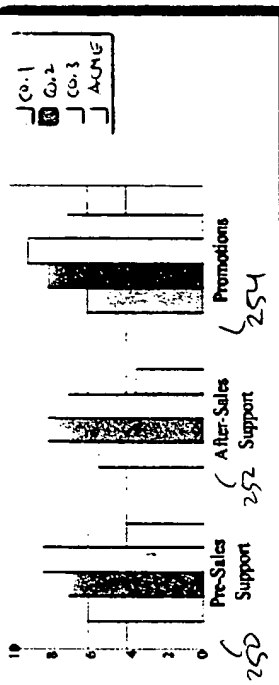
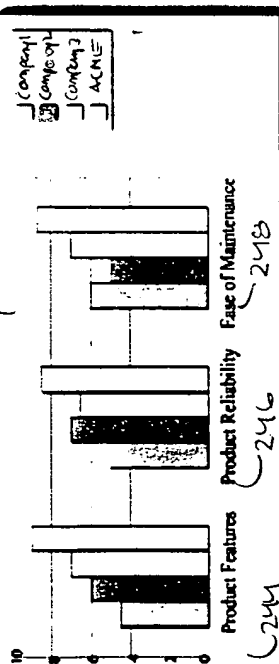
Report Card for ACME Widget
Period: 9/1/00 - 10/1/00

236 Page 1 | Page 2 | Main

Recommend Next Survey

Under Performance

Over Performance



Key Indicator Trends

Sales Promotions	258	9.0	↑	+7%
Product Variety	260	8.7	↑	+4%
Ease of Use	262	6.0	↓	-4%
After-Sales Support	264	3.5	↓	-3%

Hi's/Low's

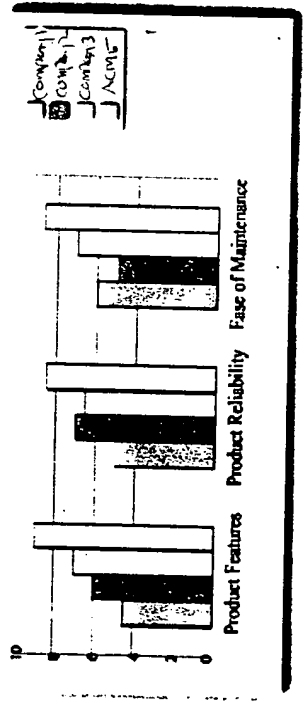
Product Quality	9.3	-	+0.1%
Product Reliability	8.9	↑	+2%
Value for Money	6.0	-	-4%
Training Programs	3.5	-	-0.2%

FIG. 12

Report Card for ACME widget

Period: 9/1/00 - 10/1/00

Over Performance



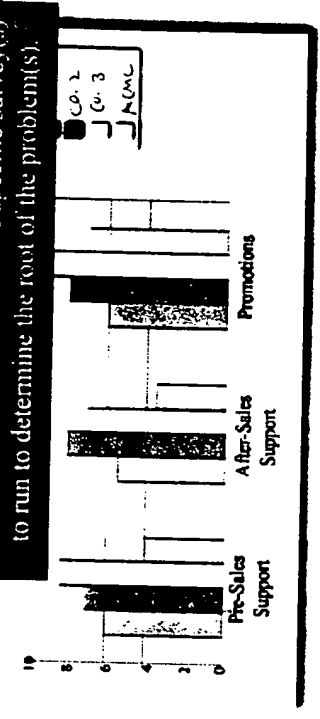
Under Performance

Get a recommendation for more specific survey(s)
to run to determine the root of the problem(s).

Recommend Next Survey

268

270



Key Indicator Trends

Sales Promotions	9.0	↑	+7%
Product Variety	8.7	↑	+4%
Ease of Use	6.0	↓	-4%
After-Sales Support	3.5	↓	-3%

Hi's/Low's

Product Quality	9.3	—	+0.1%
Product Reliability	8.9	↑	+2%
Value for Money	6.0	—	-4%
Training Programs	3.5	—	-0.2%

FIG. 13

General Area Surveys

Preview and Deploy Selected Surveys

Name	Status	Last Run	Run
Channel Relationships	Recommended	Never	<input checked="" type="checkbox"/>
Customer Satisfaction	Hint: The system has indicated which surveys you are likely to find most useful. Verify its choices and select Preview and Deploy Selected Surveys	OK	<input checked="" type="checkbox"/>
Competitive Position	<input checked="" type="checkbox"/> Turn off this hint in the future. <input checked="" type="checkbox"/> Turn off all hints in the future.		<input checked="" type="checkbox"/>
Awareness			<input checked="" type="checkbox"/>
Image	Not Indicated	Never	<input checked="" type="checkbox"/>

FIG. 14

FIG. 15

ACME

General Area Surveys

Preview and Deploy Selected Surveys

272

284

Name	Status	Last Run	Run
Channel Relationships	(282) Recommended	Never	<input checked="" type="checkbox"/>
Customer Satisfaction	Not Indicated	10/1/00	<input checked="" type="checkbox"/>
Competitive Position	Not Indicated	6/1/00	<input checked="" type="checkbox"/>
Awareness	User Selected (280)	Never	<input checked="" type="checkbox"/>
Image	Not Indicated	Never	<input checked="" type="checkbox"/>

FIG. 16

Reseller Satisfaction for Acme Widget

Recommend Next Survey

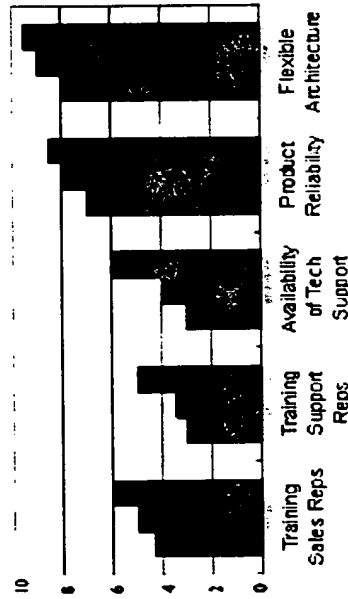
Displays

291 ~ Demographics 292

By Reseller

288

☐ Small, <\$1M
☐ Medium, >\$1M, <\$10M
☐ Large, >\$10M



By Competitor) 290

250

Siemens
Lucent
Nortel
NFC

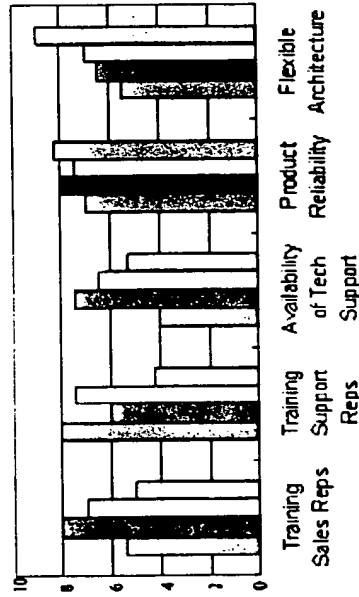


FIG. 17